WorldCat Discovery release notes, September 2019

Introduction

This release of WorldCat Discovery provides new features and enhancements:

- The ability to ungroup related editions by default.
- Retain filter selections for subsequent searches by default.
- Inclusion of additional MARC metadata in detailed record views of WorldCat Discovery
- Bug fixes and performance improvements

Many of these enhancements are the direct result of your feedback.

Recommended actions

For this release, we recommend that you review the following checklists and complete the relevant tasks so that you can adjust your policies and workflows and train your staff. These checklists identify updates that we have determined as significant for most institutions. We encourage you to review all of the items in the release notes to determine whether there are other items that might require additional action or follow up by your institution.

Administrative actions

These items require immediate action or decisions.

<table>
<thead>
<tr>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>❑ Review and update new Search Settings module</td>
</tr>
</tbody>
</table>

New features and enhancements

Library staff can enable ungrouping of search results by default to support
unique workflows

You can now configure WorldCat Discovery to ungroup clusters of editions and formats by default. When the default ungroup feature is enabled, patrons will see Group Related Editions unchecked underneath Search Tools.

We recommend that you carefully consider the benefits of edition clustering before setting your default display to ungroup related editions. For example, you might want to default to an ungrouped view if your library scope is set to your institution (rather than libraries worldwide) to feature items in your library’s collections. Be aware that presenting an ungrouped list to patrons may present more options than desired. Our user research and testing has shown that clustering editions and formats adds efficiency to searching for most users. Enhancements such as displaying additional formats of other locally-owned editions in search results, choosing to group or ungroup related editions, and options to filter and sort lists of editions and formats in clusters help users manipulate clusters rely on clustering to be enabled. The example workflow below further illustrates the benefits of viewing search results in a clustered list:
This workflow changes significantly when the search results list is ungrouped:

<table>
<thead>
<tr>
<th>1. Matches are made</th>
</tr>
</thead>
<tbody>
<tr>
<td>Many records are returned</td>
</tr>
<tr>
<td>Same titles listed many times</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2. No representative record logic applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>No editions and formats are grouped</td>
</tr>
<tr>
<td>Same titles listed many times</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3. Relevancy sort applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grouped records sorted</td>
</tr>
<tr>
<td>Search results are streamlined</td>
</tr>
</tbody>
</table>

Background on our research related to clustering is provided in "Edition Clustering in WorldCat Discovery and WorldCat Local."
Configuration of the ungroup default is managed in a new Search Settings module within OCLC Service Configuration at worldcat.org/config > WorldCat Discovery and WorldCat Local > Search Settings > Search Defaults > Group related editions by default. When the setting is set to off, patrons will see a flat list of items in search results rather than a view that clusters editions and formats. This feature will be disabled by default. The image below demonstrates what this feature looks like when it is enabled in the OCLC Service Configuration.

Library staff can opt to keep filter selections for subsequent searches by default to improve basic searching workflows

Library staff can now configure a setting to keep filter selections for subsequent searches by default. This setting will save time and reduce the number of clicks for subsequent searches for patrons who often repeat the same type of search. The “keep filter selections” setting will be available in the new Search Settings module within OCLC Service Configuration at worldcat.org/config > WorldCat Discovery and WorldCat Local > Search Settings > Search Defaults > Keep filter selections for next search. This new feature is disabled by default.
When this new setting is enabled, patrons that have selected filters will see the check box for “Keep selections for next search” selected by default.
Additional format information in detailed records will support fulfillment decisions for users with specific needs

In collaboration with Library and Archives Canada, we have added information from metadata in more 5XX fields to detailed record displays. This improvement will empower users to make more informed decisions regarding the best resource for their needs. The following fields and subfields, along with corresponding labels, will display in descriptions within detailed views:

<table>
<thead>
<tr>
<th>LABEL FOR DISCOVERY DETAIL DISPLAY</th>
<th>MARC FIELD</th>
<th>MARC SUBFIELDS</th>
<th>METADATA THAT WILL DISPLAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restrictions on Access</td>
<td>506</td>
<td>a</td>
<td>Any restrictions which might impact access or availability for either direct borrowing or ILL</td>
</tr>
<tr>
<td>Type of computer file</td>
<td>516</td>
<td>a</td>
<td>Data type or note, such as</td>
</tr>
</tbody>
</table>


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Bug fixes

Faster updates to OpenURL resolvers in the A to Z list platform

Patrons and library staff will now see instant updates in the A to Z list ILL request button when changing OpenURLs in
their institutions’ Service Configuration settings. Prior to this, updates took longer and required assistance from OCLC.

**Option for no default in WorldShare ILL patron request forms honored**

When you configure a WorldShare ILL patron request form in worldcat.org/config > WorldShare ILL > Patron Request Workforms with a drop-down field (e.g. State/Province) but neglect to select a default value (e.g. Ohio), the work form will now reflect your choice. Previously, when no default value was selected, the preview display functionality for Patron Request Workforms in Service Configuration rendered as a blank screen and patrons would land on an “Oops” error page in WorldCat Discovery when they tried to submit a request.

Course Reserves courses that have been created on the current day or have a start date that is the current date will now display when the Active filter is enabled. Prior to this release, Course Reserves that were activated or had a course start date for the current date did not display when filtering to “Active” courses.

**Course Reserves will correctly filter to Active**

Course Reserves courses that have been created on the current day or have a start date that is the current date will now display when the Active filter is enabled. Prior to this release, Course Reserves that were activated or had a course start date for the current date did not display when filtering to “Active” courses.

**Important links**

**Support website(s)**

Support information for this product and related products can be found at:

- [WorldCat Discovery](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2019_Release_Notes/060Wo…)
- [Contact OCLC Support](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2019_Release_Notes/060Wo…)
- [OCLC Community Center](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2019_Release_Notes/060Wo…)
- [Browser compatibility chart](https://help.oclc.org/Discovery_and_Reference/WorldCat_Discovery/Release_notes/2019_Release_Notes/060Wo…)

**Include Request ID with problem reports**

When reporting an issue with WorldCat Discovery, it is extremely helpful to include the Request ID. The Request ID is found at the bottom of the screen on which the issue occurred. Including this information allows us to directly trace what happened on the request we are troubleshooting.